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ABSTRACT

Comprehensive rules, guidelines, and examples are provided for use by ERIC indexers and lexicographers in creating and using Identifiers, and in developing and maintaining the ERIC Identifier file via the "Identifier Authority List (IAL)." Identifiers and the IAL are defined/described: Identifiers are highly specific entities, including most proper nouns/noun phrases, for which Thesaurus control is unnecessary--they may also be new concepts, under consideration, or awaiting approval, for admission to the ERIC Thesaurus; the IAL lists all current Identifiers and serves as a companion volume or supplement to the Thesaurus. An initial discussion distinguishes Identifier editing procedures between the ERIC database's two subfiles, RIE and CIJE, and differentiates the roles of the ERIC Clearinghouses and the ERIC Facility in IAL maintenance. The next section presents general guidelines/rules applying to all Identifiers (e.g., capitalization, punctuation, length, word form). This is followed by detailed instructions relating to each of twenty specific Identifier categories: Conferences/Meetings; Curriculum Areas; Equipment (including Computers and Software); Facilities; Geographic Locations; Groups (Ethnic); Groups (Occupations); Groups (Other); Health-Related (including Psychology); Historical/Special Events; Languages/Linguistics; Laws/Legislation; Methods/Theories; Miscellaneous; Organizations/Institutions; Personal Names; Projects/Programs; Science and Technology; Tests/Testing; Titles (Literary and Artistic). (JH)

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Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section VIII: Vocabulary Development and Maintenance (Part 2)—Identifiers

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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SUMMARY OF SIGNIFICANT RULES

1. Identifiers are semi-controlled retrieval terms intended to add a depth to indexing that is not always possible with Descriptors alone. An Identifier is usually the name of a specific entity, e.g., project, person, place, organization, test, group, item of equipment, piece of legislation. An Identifier may also be a new concept, under consideration for Descriptor status and awaiting approval for admission to the ERIC *Thesaurus*.
2. The *Identifier Authority List* (IAL) should be consulted before index terms are added to the Identifier fields of RIE and CJE. The IAL serves as a companion volume or supplement to the ERIC *Thesaurus*.
3. A term may not be an Identifier if it is an existing Descriptor, a synonym (UF) referenced to a Descriptor, a Dead/Invalid Descriptor, or a variant form of a Descriptor.
4. Because acronyms have a high potential of being homographs, their use alone is to be avoided.
5. Identifiers may not exceed 50 characters in length, including spaces. Terms naturally exceeding 50 characters must be shortened according to prescribed procedures (i.e., by removal of articles, conjunctions, prepositions, etc., or by abbreviating common words). However, the first word of an Identifier may never be an abbreviation although it can be an acronym.
6. Spelling and word form conventions used for Descriptors should also be used for Identifiers. Spelling of proper names should not be changed. American (United States) English standard usage is followed for common nouns.
7. Non-English terms not found in standard unabridged English dictionaries or in specialized subject dictionaries ordinarily should be translated (unless they have no ready English equivalent, e.g., *Intifada*, or unless they are part of a personal or proper name, such as the *name* of an organization, where translation depends on the way the name usually appears in English print).
8. Numbers exceeding one word in length should normally be written as Arabic numerals (except when the spelled out version is the official or formal name). Roman numerals are generally permitted only when used as the numbers of legislative "titles."
9. Identifiers do not have the complex hierarchical structure of Descriptors, but they may, as needed, have UFs (providing cross-references) or Scope Notes (providing explanatory material).
10. Identifiers that are homographs must be differentiated either by a parenthetical qualifier or by a spelling variation. They cannot be differentiated by spacing or case.
11. Identifiers may not contain ANY punctuation other than left and right parentheses.
12. Identifiers are grouped by specific characteristics or subject matter into twenty (20) categories, i.e., personal names, organizations, geographic locations, etc. In addition to the general rules contained in this summary, each category has its own specific conventions or guidelines that should be followed in creating new Identifiers.

VIII. VOCABULARY DEVELOPMENT AND MAINTENANCE (PART 2)—IDENTIFIERS

A. Introduction

Whereas Part 1 of Section VIII discussed the development and maintenance of Descriptors (controlled indexing terms), Part 2 addresses the creation and use of Identifiers (semi-controlled indexing terms). In addition, this Section also describes the procedures used by the ERIC Facility to review incoming Identifiers and to maintain the *Identifier Authority List* (IAL). As with Descriptors, all of the discussion in the Section applies to usage in both *Resources in Education* (RIE) and *Current Index to Journals in Education* (CIJE).

1. Definition and Function

Identifiers are semi-controlled retrieval terms, intended to add a depth to indexing that is not always possible with Descriptors alone. An Identifier is usually the name of a specific entity, e.g., project, piece of legislation, person, place, organization, test, group, item of equipment. There is a nearly infinite number of specific entities, and it is not appropriate to burden a thesaurus with such multiplicity. Also, the specificity of Identifiers makes them often transitory and infrequent, conditions that further justify exclusion from a controlled indexing authority such as the *Thesaurus of ERIC Descriptors*.

An Identifier may also be a new concept, under consideration for Descriptor status once its scope, definition, and "staying power" have been established. Candidate Descriptors, awaiting approval for admission to the *Thesaurus of ERIC Descriptors*, must always be indexed as Identifiers. In fact, reasonable frequency of use as an Identifier is one of the factors in the decision to "graduate" Identifiers to Descriptors.

Identifiers are not structured or typically defined in a formal way as Descriptors are; however, they must be somewhat controlled in order to eliminate the proliferation of variant forms of the same concept. Such control is achieved by imposing format standards, particularly for such entities as geographic locations, organization names, and specific ethnic and occupational groups.

The ERIC Identifiers have been grouped into meaningful categories for the purpose of bringing like terms together. Figure VIII-2-1 depicts the current set of ERIC Identifier categories, and the number of Identifiers, as well as the percentage of all Identifiers, in each category as of 1992. Categories are useful in subdividing an Identifier file for particular indexing and searching applications. The categories are a quick way for indexers to determine available options among particular types of terms. Omissions and commissions of Identifiers are more easily spotted using a smaller category than in using an alphabetical list of all Identifiers.

2. *Identifier Authority List* (IAL)

The *Identifier Authority List* (IAL) is a total alphabetical list of the preferred Identifier forms, developed according to standards discussed in this Section, that can be used to achieve consistency in indexing and searching alike. In its two printed forms (Alphabetical and Category Displays), it serves as a companion volume or supplement to the ERIC *Thesaurus*. Just as the *Thesaurus* controls Descriptor usage, the IAL provides control over Identifiers to the extent that variant forms of the same concept are eliminated.

VOCABULARY—IDENTIFIERS

CATEGORY NUMBER	CATEGORY NAME	NUMBER OF IDENTIFIERS IN CATEGORY	PERCENT OF IDENTIFIER ALLOCATION
02	CONFERENCES/MEETINGS	356	.8
03	CURRICULUM AREAS	568	1.3
04	EQUIPMENT (INCLUDING COMPUTERS AND SOFTWARE)	1,419	3.2
05	FACILITIES	520	1.2
07	GEOGRAPHIC LOCATIONS	2,513	5.7
08	GROUPS (ETHNIC)	441	1.0
09	GROUPS (OCCUPATIONS)	691	1.6
10	GROUPS (OTHER)	449	1.0
11	HEALTH-RELATED (INCLUDING PSYCHOLOGY)	1,965	4.5
12	HISTORICAL/SPECIAL EVENTS	235	.5
13	LANGUAGES/LINGUISTICS	1,420	3.2
14	LAWS/LEGISLATION	1,308	3.0
15	METHODS/THEORIES	3,907	8.9
16	MISCELLANEOUS	3,180	7.2
17	ORGANIZATIONS/INSTITUTIONS	9,221	21.0
18	PERSONAL NAMES	3,074	7.0
19	PROJECTS/PROGRAMS	4,221	9.6
20	SCIENCE & TECHNOLOGY	2,029	4.6
21	TESTS/TESTING	5,252	11.9
22	TITLES (LITERARY & ARTISTIC)	1,232	2.8
	TOTAL	44,001	100.0

FIGURE VIII-2-1: ERIC IDENTIFIER CATEGORIES (Statistics for 1992)

First published in 1980, the IAL was the result of an Identifier editorial project that reviewed the Identifiers in the ERIC master file from the beginning of ERIC in 1966 through April 1976. The project ultimately reduced the number of Identifiers on the file for that period from approximately 46,000 to 25,000. The cumulation of this large number of Identifiers over ERIC's first 10 years occurred as the system evolved from a manual, print-oriented database to a system accessible via computer in a variety of different ways. As the number of entry points increased and the file expanded, it became necessary to reduce the number of ways single subjects could be accessed.

The approximately 25,000 edited Identifiers, known as "preferred terms," became the basis for the IAL as it now exists. The other 21,000 "non-preferred terms" were either variant Identifier forms transferred to one of the preferred forms, variants (or duplicates) of Descriptors and eventually transferred to the appropriate Descriptor, or unnecessary or ambiguous items that could simply be purged.

Another by-product of the Identifier editorial project was the creation of the detailed guidelines in this Section. The third consequence of the project was the establishment of ERIC Facility review and maintenance procedures described later in this Section.

Since the creation of the IAL in mid-1980, the IAL has increased in size to more than 44,000 Identifiers, as new terms were added as a result of the regular monthly input to the database. Items are purged from the IAL as they are upgraded to Descriptor status and shifted to the ERIC *Thesaurus*.

The printed IAL, including its supplements, should always be consulted before index terms are added to the Identifier fields of RIE and CIJE. The computerized IAL is used as a validation file during the editing of all incoming ERIC resumes.

B. Identifier Editing Procedures

1. RIE

All Identifiers on incoming resumes for RIE are validated by computer against the IAL, and terms in the field not found in the IAL are flagged as "unauthorized." In addition, the computer program checks each term for length (it may not exceed 50 characters) and for the existence of invalid punctuation. All Identifiers flagged as "unauthorized," or exhibiting one of the other conditions, are reviewed by the lexicographic staff.

The staff checks the IAL to determine if a Descriptor or existing Identifier can be substituted for the unauthorized Identifier. If not, then the term is checked to ensure that it meets the guidelines for use as well as format.

Using the guidelines in this Section, as well as those found in Section VII on "Indexing," unauthorized Identifiers are evaluated and accepted as is, reformatted and then approved, or rejected. (Of the unauthorized Identifiers flagged each month, approximately 60% are implemented.) A Category is assigned and requirements for the addition of a Scope Note and/or Synonyms are noted. The Facility editors make any necessary corresponding changes to the RIE input.

Since one of the roles of the Facility is to help ensure uniformity of indexing for the sixteen Clearinghouses' RIE input, the omission or inclusion of existing Identifiers is also reviewed. When appropriate, Identifiers may be added or deleted.

VOCABULARY—IDENTIFIERS

2. CIE

Identifiers on CIE input are also validated by the computer and terms not in the IAL flagged. CIE editors correct invalid Identifiers and reformat incorrect or misspelled Identifiers. The terms are not currently evaluated for inclusion in the IAL nor assigned to a Category.

3. ERIC Facility IAL Maintenance Procedures

After new "unauthorized" Identifiers are approved for use on RIE resumes, the terms are permitted to enter the database. However, at this point, these terms have not yet been implemented to the IAL. At the end of the monthly issue, an Exception Report, showing all of the "unauthorized" terms for that issue, is generated by the computer. The master authority list (IAL) is then updated.

Other additions, changes, or deletions to the IAL are made at the same time as the update. Whenever the ERIC *Thesaurus* is updated with new Descriptors, most of which are "graduates" from the IAL, the corresponding terms, as well as any existing synonyms, are purged from the IAL. Periodically, the Facility also reviews the IAL for highly posted Identifiers. These terms are typically candidates for "graduation." (See Section VIII-1, Item C.1.b and Figure VIII-1-4 for more information about this list.)

4. Clearinghouse Role in IAL Maintenance

Although Clearinghouses are not required to formally submit terms for the IAL as they are with the *Thesaurus*, it is recommended that Clearinghouses maintain an inhouse list of all Identifiers that are potential Descriptors. This list periodically should be reviewed and Vocabulary Development Forms (see Section VIII-1, Item E) generated when the volume of postings of these Identifiers warrants such action.

Whenever it is necessary to create a new Identifier for a large series of documents, Clearinghouses are urged to coordinate the term with the Facility lexicographic staff before assigning it to multiple resumes. In addition, Clearinghouses are encouraged to share with other indexers (e.g., via electronic mail) any new concepts in their field and how these should be identified. For example, the Clearinghouse on Urban Education informed the network about the new movement "Accelerated Schools." Since this movement is not the same as the existing Descriptor "Acceleration (Education)," UD requested that indexers encountering this concept use the Identifier "Accelerated Schools." Such coordination helps avoid variant forms in new Identifiers.

C. General Guidelines/Rules Applying to All Identifiers

1. Document/Identifier Relationship—The IAL Takes Precedence

Although a basic principle in cataloging is to follow the document, when it comes to Identifiers, the spelling and form in the IAL take precedence over what is used in the document. Spelling of the names of individuals, form and/or spelling of the names of organizations, projects, tests, etc., are frequently incorrectly used by authors. One frequently cited individual, Erik Erikson, can be found as: Eric Erikson, Erich Ericson, Erik Erickson, Eric Erikkson, Erik Erichson, etc. Since it is usually clear from the document to whom the author is referring, indexers should use the approved Identifier in the IAL.

2. Terms That May Not Be Identifiers**a. Descriptors**

Once terms have been approved as valid Descriptors, they may not be used as Identifiers (even if they were formerly in the IAL). The *Thesaurus* always takes precedence over the IAL.

b. Synonyms (Ufs) of Descriptors

Synonyms in the *Thesaurus* that are cross-referenced to Descriptors may not be Identifiers. The *Thesaurus* leads the user from these terms to a particular valid Descriptor. To make them Identifiers would undercut this cross-reference and would be contrary to a lexicographic decision already made and recorded.

c. Dead/Invalid Descriptors

Terms that once were valid Descriptors, but that have been deliberately removed from the *Thesaurus* as usable terms, may not be Identifiers. The qualities of these terms that made them undesirable as Descriptors (e.g., ambiguity) also make them undesirable as Identifiers.

d. Variant Forms of Descriptors

Not all variant forms of Descriptors can be inserted into the *Thesaurus* as Ufs. Terms that are merely variant ways of expressing a concept already represented by a Descriptor should not be made Identifiers. The appropriate Descriptor should always be substituted in such cases.

Examples of this situation are as follows:

DESCRIPTIONS	VARIANT TERMINOLOGY WHICH THE DESCRIPTOR CAN STAND IN FOR WHICH SHOULD NOT BECOME IDENTIFIERS
Neonates	Newborns Neonatal Behavior Neonatal Characteristics Neonatal Research
Performance Contracts	Performance Contracting Student Learning Contracts Contract Teaching Contract Learning Grade Contracts

VOCABULARY—IDENTIFIERS

3. Acronyms

The use of acronyms as identifiers is discouraged. By their nature, acronyms are prone to being homographs. In general, acronyms may be used when they will not be confused with other words or acronyms. Figure VIII-2-2 illustrates the kinds of problems experienced with acronyms. Figure VIII-2-3 displays examples of some acronyms that have been approved for use as identifiers.

ACRONYM		DEFINITION
ICONS	Icons	An acronym for <u>I</u> nteragency <u>C</u> onference <u>o</u> n <u>N</u> ursing <u>S</u> tatistics A language term meaning pictorial representation
TACTICS	Tactics	An acronym for <u>T</u> echnical <u>A</u> sistance <u>C</u> onsortium <u>to</u> <u>I</u> mprove <u>C</u> ollege <u>S</u> ervice As in tactics for handling labor relations, military situations, etc.
CASE	Case	A computer program A linguistic term
CASE		An acronym for <u>C</u> ouncil for <u>A</u> dministration of <u>S</u> pecial <u>E</u> ducation
CASE		An acronym for <u>C</u> ouncil for the <u>A</u> dvancement and <u>S</u> upport of <u>E</u> ducation
RIF		An acronym for <u>R</u> eading <u>I</u> s <u>F</u> undamental
RIF		An acronym (and UF) for <u>R</u> eduction <u>i</u> n <u>F</u> orce
Rif		A language

FIGURE VIII-2-2: EXAMPLES OF PROBLEMS EXPERIENCED BY USING ACRONYMS AS IDENTIFIERS

VOCABULARY—IDENTIFIERS

AAHPERD	American Alliance for Health, Physical Education, Recreation, and Dance
AFL CIO	American Federation of Labor and Congress of Industrial Organizations
AUDACIOUS	Automatic Direct Access to Information with the Online UDC (Universal Decimal Classification) System
AUSINET	Australian Information Network
BALLOTS	Bibliographic Automation of Large Libraries Using Time-Sharing
CINTERFOR	Centro Interamericano de Investigacion y Documentacion sobre Formacion Profesional (Interamerican Research and Documentation Center on Vocational Training)
CDA	Child Development Associate
DIDACTA	European media conference
ERIC	Educational Resources Information Center
INSPEC	Information Services for the Physics and Engineering Communities
MEDLARS	Medical Literature Analysis and Retrieval System
OCLC	Online Computer Library Center
PLATO	Programmed Logic for Automated Teaching Operations
SUPERMARC	Data format standard
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USSR	Union of Soviet Socialist Republics
VAULT	Veterans Accelerated Urban Learning for Teaching

FIGURE VIII-2-3: EXAMPLES OF ACRONYMS APPROVED AS IDENTIFIERS

VOCABULARY--IDENTIFIERS

Identifiers should not be created in the form of the spelled out version followed by the acronym in parentheses (nor should the reverse form of parenthetical spelled out name behind the acronym be used). As much as possible, the spelled out version should be used in lieu of the acronym. Should an indexer wish to associate an acronym with its spelled out version, the place to do so is in the abstract/annotation, as in the following example:

ABST...Students involved in the project were clients of the Job Training Partnership Act (JTPA) who had participated in the College Level Examination Program (CLEP)...

IDEN_Job Training Partnership Act 1982; College Level Examination Program

When a multiword Identifier exceeds 50 characters, it may be necessary to make use of abbreviations (or sometimes acronyms) to keep within the 50-character limit (see below, "Identifier Length").

4. Identifier Length

Identifiers may not exceed a maximum of 50 characters in length (including blanks). Terms naturally exceeding 50 characters must be shortened:

- via the removal of conjunctions, articles, or prepositions, or, if that is insufficient,
- via the abbreviation of common words (see Figure VIII-2-4).

The first word of an Identifier should not be abbreviated (except in the case of certain approved acronyms, e.g., "ERIC"). The common words may be abbreviated anywhere else they appear; however, in general, when an Identifier requires abbreviation it is better to abbreviate toward the end of the term rather than toward the beginning. Also, in general, the words in an Identifier that are of greatest significance for searching and retrieval should not be abbreviated. Two examples follow:

Original Term (53 characters)	American Association of Community and Junior Colleges
Abbreviated Identifier (50 characters)	American Association of Community and Junior Colls

"Colleges" is the best word to abbreviate because it appears in the table of common words and is the last word in the Identifier. "Association" and "Community" might also have been abbreviated, but altering either would cause the term to be moved unnecessarily from its normal alphabetical sequence in the authority list.

Original Term (69 characters)	Federation of Associations in the United States of America and Canada
Abbreviated Identifier (48 characters)	Federation of Associations in the USA and Canada
(Preferred over the following alternative)	Federation Associations United States Canada

"Federation" and "Associations" are the key words for retrieval and should not be abbreviated. The first alternative does the least overall violence to the original name.

5. Numbers

Numbers exceeding one word in length, whether they are a part of or the whole of the concept being indexed, should normally be written as Arabic numerals and not spelled out, unless the spelled out version is the official or formal version.

Examples of Identifiers containing Arabic numbers are:

1984 (Title)	NOTE: The qualifier "(Title)" is placed after the names of literary/artistic works that might otherwise not be recognized as such.
1 8 1 8 Plan 4 1 4 Calendar 45 15 Plan 4 H Clubs Congress 102nd Hawkins Stafford Act 1988	

Examples of Identifiers using spelled out numbers are:

First Born	Second Careers
Fourteenth Amendment	Three Mile Island
Nineteenth Amendment	Twentieth Century
One Act Plays	Two Stage Testing
One Parameter Model	Two Way Communication
One Word Sentence Completion	

VOCABULARY—IDENTIFIERS

Academy, Academic	Acad	Government	Govt
Administration,		Guidance	Guid
Administrators		Hospital(s)	Hosp
Administrative	Admin	Industrial, Industry	Indust
Affiliated, Affiliation	Affil	Information	Info
Agriculture, Agricultural	Agric	Institute(s),	
American	Amer	Institution(s)	Inst
Association(s)	Assn	Instruction, Instructional	Instr
Associate(s)	Assoc	Interdisciplinary	Interdiscip
Audiovisual	AV	International	Intl
Behavioral, Behavior	Behav	Laboratory	Lab
Biological, Biology	Biol	Language(s)	Lang
Biomedical, Biomedicine	Biomed	Library	Lib
Board(s)	Bd	Literature	Lit
Bureau(s)	Bur	Mathematics	Math
Business	Bus	Metropolitan	Metro
Center(s), Centre(s)	Ctr	National	Natl
Chemistry	Chem	Occupational,	
College(s)	Coll	Occupations	Occup
Committee, Community	Comm	Program(s)	Prog
Communication(s)	Commun	Project(s)	Proj
Conference(s)	Conf	Psychological	Psych
Convention(s)	Conv	Research	Res
Continuing	Cont	Research and Development	R and D
Cooperative, Cooperation	Coop	School(s)	Sch
Coordination, Coordinator	Coor	Science(s)	Sci
Corporation(s)	Corp	Service(s)	Serv
Curriculum	Curr	Session(s)	Sess
Department(s), Departmental	Dept	Special	Spec
Development, Developmental	Develop	Superintendent(s)	Supt
District(s)	Dist	Teaching, Teacher(s)	Teach
Division(S)	Div	Technical	Tech
Education, Educational	Educ, Ed	Technological,	
Evaluation	Eval	Technology	Techn
Faculty, Faculties	Fac	Television	TV
Facility, Facilities	Facil	University	Univ
Federal	Fed		

FIGURE VIII-2-4: COMMON WORDS THAT MAY BE ABBREVIATED IN IDENTIFIERS WHEN TRUNCATING TO MAKE 50-CHARACTER LIMIT

Roman numerals are generally permitted only when used as the numbers of "Titles" (i.e., sections) in legislation, e.g.:

Elementary Secondary Education Act Title III
Social Security Act Title XX

Some legislation, however, contains Arabic numerals:

Education Consolidation Improvement Act Chapter 1
Rehabilitation Act 1973 (Section 504)

The official or formal version of a numerical concept is always chosen when it can be determined, even if it should vary from the above conventions.

Calendar dates (years, months, days) should always be expressed as numerals, except in those special instances where a date (spelled out) is the title of a literary/artistic work, e.g., "Twelfth of June (Title)."

6. Spelling and Word Form

In general, the same spelling and word form conventions used for Descriptors should also be used for Identifiers. This allows concept-type Identifiers, when appropriate, to "graduate" to Descriptor status with a minimum of alteration. It is also beneficial to searchers if they can rely on ERIC to be consistent in the construction of its index terms.

The spelling of proper names should not be changed from that of the official or formal version, e.g.:

- Centre for Continuing Education (Australia) (Do not change "Centre" to "Center.")
- Organisation for Economic Cooperation [and]¹ Development (Do not change "Organisation" to "Organization.")
- Computer Programmer Aptitude Battery (Do not change "Programmer" to "Programer.")

However, American (i.e., United States) English standard usage is followed when common nouns or generics are involved, e.g.:

- Programmed Student Achievement
- Testing Centers
- Student Health Organizations

¹ "And" deleted to keep name within 50-character limit.

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The *Thesaurus' Rotated Display* is an excellent source to consult in determining the proper spelling and/or format for similar words, e.g.

PROPERIZED WORD FORM	NON-PROPERIZED WORD FORM	CIVILIAN USE FROM SPECIAL ALIAS ROTATED DISPLAY
Parent Resources Parent Surveys	Parental Resources Parental Surveys	Parent Associations Parental Background USE Parent Background
Theological Libraries	Libraries (Theological)	Public Libraries Regional Libraries School Libraries (i.e., No inverted entries)
Programmed Student Achievement	Programmed Student Achievement	Programmed Instruction Programmed Tutoring (i.e., No double m's)
Retroaction (Psychology)	Retroaction (Psychological)	Recall (Psychological) USE Recall (Psychology)

7. Non-English Terms

The English language incorporates much terminology from other languages for which there is no exact or simple translation into English, e.g., Deja Vu, Machismo, Roman a Clef. Such terms can regularly be found in English language dictionaries and can therefore be considered part of the normal resources of the language. They need not be translated when used as Identifiers.

In addition, a great deal of Latin terminology can be considered a normal part of English usage, particularly as employed in the fields of law and medicine, e.g., Corpus Delicti, Otitis Media. Such terms likewise need not be translated.

The propensity of English to "borrow" in this way makes it difficult to formulate a single general rule that applies to all non-English terminology.

If a non-English term or phrase can be found in standard unabridged English dictionaries, or in the specialized dictionaries of fields such as law and medicine, then the term may be used as is, without translation. If a term cannot be identified and it can be easily translated, then it should be translated into English; for example, the German "Strahlenchemie" can be translated to "Radiation Chemistry". Translation should be based closely on the original and should not be excessively creative or "free." The objective is to translate in a repeatable way so that if another indexer at another time is faced with the same term the same translation will result. Concepts that cannot be easily translated or have no English equivalent may be entered under the non-English term (and, if needed, defined in the abstract). For example, "Perestroika" was used in the media without translation. When the topic appeared in ERIC documents, it was entered as an Identifier without translation. (Translators should keep in mind that the ERIC database does not provide for diacritical marks of any kind.)

The use of foreign proper names as Identifiers depends on the way they normally appear in English print. In general, personal names are recorded as close to their appearance in their original language as possible. A good reference to use for personal name form problems is the *Anglo-American Cataloguing Rules*. Organizational names present a more complex problem. Names from languages with non-Roman alphabets (e.g., Cyrillic) are always translated (not just transliterated) into their English equivalent. Names from other languages should follow the practice of the standard international reference work in the field of institutions of education, *The World of Learning*.

Examples of some non-English terms and how they would be handled as Identifiers are displayed in Figure VIII-2-5.

Two general references of value are:

- Section 24: "Foreign Languages" of the *GPO Style Manual*, and
- Section 9: "Foreign Languages in Type" of the *Chicago Manual of Style*.

Both contain detailed material on typography, diacritics, capitalization, punctuation, special characters, abbreviation, word division, etc., of all the common foreign languages.

8. Structure (i.e., Cross-References, Scope Notes)

Identifiers do not have the complex cross-reference structure accorded Descriptors, i.e., NTs, BTs, RTs. However, two elements of structure exist for Identifiers in the *Identifier Authority List*: (1) Used For cross-references, and (2) Scope Notes. Either or both of these elements may be added on an "as needed" basis to any given Identifier. The decision to include one or both of these elements is made by the lexicographer at the ERIC Facility.

a. "Used For" Cross-References

Used For cross-references should be used either to indicate preferred name forms or to lead from an abbreviation/acronym to the correct full form, e.g.:

Empire State College NY
USE State University of New York Empire State Coll

CETA
USE Comprehensive Employment and Training Act

Cross-references will not normally be made from nonpreferred direct forms (e.g., San Juan Puerto Rico) to preferred inverted forms (e.g., Puerto Rico (San Juan)).

Used For references are limited in length to 50 characters (including blanks).

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TERM	NOTE
Avant Garde	"Borrowed" French term.
Blitzkrieg	"Borrowed" German term.
*Carrascolendas (Television Series)	Television Series.
*De Bello Civilis	Classical Latin text.
*Diaz del Castillo (Bernal)	Person.
*Dia de los Muertos	Hispanic holiday.
*Globus Hystericus	Medical term (Latin).
*Habeas Corpus	Legal term (Latin).
*Laissez Faire	"Borrowed" French term.
*La Raza Unida Party	Political party. Name commonly used untranslated in both Hispanic and English contexts.
*Machismo	"Borrowed" Spanish term.
*Moscow State University (USSR)	Foreign organization. Translated from Russian (Cyrillic).
*Otitis Media	Medical Term (Latin).
Realites	French Magazine.
*Referendums	Legal term (Latin).
Tae Kwon Do	Martial Art. Transliterated from Japanese.
*Universidad de Educacion a Distancia (Spain)	Foreign organization. Name form retained as is. Country added in parentheses.
*War and Peace	Name of novel. Translated from Russian.
Weltschmerz	German term meaning literally "world weariness" but borrowed by English.

* Existing Identifier

FIGURE VIII-2-5: EXAMPLES OF NON-ENGLISH TERMS AND HOW THEY WOULD BE HANDLED AS IDENTIFIERS

b. Scope Notes

The Scope Note field provides a home for a wide variety of explanatory material bearing on indexing distinctions and clarifications, e.g.,

Ilocano
SN Indonesian Language

AAHPERD
SN Acronym for the American Alliance for Health, Physical Education, Recreation, and Dance

Russia
SN Before 1917 and after 1991, an independent state—see "USSR (Russia)" for the 1917-1991 time frame

In general, Identifier Scope Notes are not used simply to define a term, as is done frequently in the *Thesaurus*. It is not ERIC's intention to provide definitions for the many thousands of relatively obscure Identifiers.

9. Capitalization

Initial capital letters are used for all multi-word Identifiers, except for prepositions, articles, and conjunctions. Exceptions occur in those infrequent cases where the preposition/article/conjunction is the first word of the Identifier, or where it is used in a literary/artistic title.

NORMAL USAGE:	Department of Education
LEADING PREPOSITION:	Off Campus Activities
TITLE:	Graduate (The)

Further examples of usual and exceptional upper/lower case situations for both Descriptors and Identifiers can be found in Figure VIII-2-6. (This figure also appears in Section 7: "Indexing" in the discussion entitled "Capitalization of Index Terms.")

10. Word Order

Each Identifier category specifies its own word order conventions. If no guidelines or examples can be found pertinent to a proposed new Identifier, natural word order should be followed.

VOCABULARY—IDENTIFIERS

		DESCRIPTORS		IDENTIFIERS	
ARTICLES/ CONJUNCTIONS/ PREPOSITIONS	USUAL USAGE (LC) (Example)	EXCEPTION (UC) (Example)	USUAL USAGE (LC) (Example)	EXCEPTION (UC) (Example)	
A	Postsecondary Education as a Field of Study	None	Visit to a Small Planet	A Better Chance Inc	
AN	None	None	To an Athlete Dying Young	—	
AND	Food and Drug Inspectors	None	Crime and Punishment	And Searching Mind*	
AS	Parents as Teachers	None	Maryland Self Concept as a Learner Scale	As You Like It	
BY	Management by Objectives	None	ABC (Approach by Concept) Method	By Love Possessed*	
FOR	English for Special Purposes	None	Fund for Adult Education	For Whom the Bell Tolls*	
IN	Reduction in Force	In School Suspension; In State Students	Catcher in the Rye	In Cold Blood	
OF	Leaves of Absence	None	Signers of the United States Constitution	Of This Time of That Place	
ON	Time on Task	On Campus Students; On the Job Training	Soul on Ice	On the Origin of Species	
OR	Publish or Perish Issue	None	Truth or Consequences Administrative Unit NM*	—	
PER	Expenditure per Student	None	—	Per Capita*	
THE	State of the Art Reviews	None	College of the Sea (England)	Graduate (The)	
TO	Adjustment (to Environment)	None	Pathways to Identity Project	To Kill a Mockingbird	

LC = Lower Case; UC = Upper Case

*Not Currently an Identifier

FIGURE VIII-2-6: CAPITALIZATION OF ARTICLES/CONJUNCTIONS/ PREPOSITIONS IN DESCRIPTORS AND IDENTIFIERS

11. Punctuation

With the exception of parentheses, no punctuation may be used in Identifiers. (This restriction refers solely to punctuation within the Identifier itself and does not refer to the semicolon used as a subfield delimiter between multiple Identifiers, or to the asterisk used to tag major Identifiers.) [Hyphens found in Identifiers in online or CD-ROM versions of the database are put there by the vendor for searching purposes to "bind" terms.]

Terms normally having punctuation, e.g., commas, hyphens, apostrophes, ampersands, periods, exclamation marks, quotation marks, colons, slashes, question marks, etc., must be converted to acceptable forms without punctuation. Examples of such conversions are shown below:

POTENTIAL TERM WITH PUNCTUATION	FINAL ACCEPTABLE IDENTIFIER WITHOUT PUNCTUATION
James E. Allen, Jr.	Allen (James E Jr)
T.S. Eliot	Eliot (T S)
Eugene O'Neill	O Neill (Eugene)
Bloom's Taxonomy	Blooms Taxonomy
45-15 Plan	45 15 Plan
St. Paul Public Schools MN	Saint Paul Public Schools MN
Dick & Jane Readers	Dick and Jane Readers
If You Live in a City, Where Do You Live?	If You Live in a City Where Do You Live
They Shoot Horses, Don't They?	They Shoot Horses Dont They
Oh, God!	Oh God (Title)
"I Heard a Fly Buzz When I Died"	I Heard a Fly Buzz When I Died
Yorkshireman: A Case Study	Yorkshireman A Case Study
Board/Community Relationship	Board Community Relationship

12. Homographs

Homographs (terms with different meanings that have the same spelling) must be differentiated by creating some difference in the spelling or by adding a parenthetical qualifier, e.g.:

TERM	MEANING	DIFFERENTIATED TERMS
PLATO	Computer-assisted education system	PLATO
Plato	Greek philosopher	Plato of Athens
Jupiter	Roman god	Jupiter
Jupiter	Planet	Jupiter (Planet)
Jupiter	Ballistic missile	Jupiter Missile

Homographs cannot be differentiated by creating differences in capitalization and spacing. The ERIC computer system, in comparing index terms during the automatic validation process, converts all terms to upper case and removes blanks and special characters (except the left parenthesis). This procedure means that terms varying only in capitalization and/or the appearance of blank spaces are interpreted by the computer as the same term.

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TERMS VARYING ONLY BY CAPITALIZATION OR SPACING OR BOTH		TERMS TRANSMITTED BY COMPUTER FROM COMPARISON PROCESS
Project Out Reach Project OUTREACH Project Outreach	Project OUTREACH	PROJECTOUTREACH

If the above variant forms were actually used by ERIC indexers and were appearing together in an index, all the variants would validate, but the printed/displayed index entry would be determined by the particular variant that appeared first in the sequence of accessions involved, i.e., that was read first by the computer.

It is clearly undesirable for terms varying only by capitalization and spacing to be placed in the ERIC file. In addition to creating potentially confusing index entries, such terms can adversely affect retrieval efforts. For example, to retrieve all the accessions using the three "Projectoutreach" variant forms cited above, a searcher would have to use two distinct search strategies:

Outreach/ID
Out (w) Reach/ID

13. Special Indexing Arrangements

From time to time ERIC makes formal arrangements with specific organizations or programs to index the document output of that organization in a special way in order to facilitate retrieval. Usually these are organizations and projects funded by some element of the Department of Education, e.g., National Diffusion Network (NDN), National Assessment of Educational Progress (NAEP). All current agreements are summarized in Figure VIII-2-7. Whenever additional agreements are made, they are usually communicated to the Clearinghouses via electronic mail and/or the *ERIC Administrative Bulletin* (EAB).

In addition, Identifiers are occasionally developed for systemwide use in order to facilitate retrieval of specific classes of documents, e.g., America 2000, National Education Goals 1990, etc.

From time to time Clearinghouses agree to assign specific Identifiers, e.g., the Clearinghouse on Higher Education annually enters all of the papers from the Association for Institutional Research (AIR) annual forum and assigns the Identifier "AIR Forum" to each paper. By coordinating the Identifier and the publication date, a user is thus able to retrieve all of the papers from a specific annual meeting. While such Identifier use is at variance with the rule to index the subject of documents, such use of the Identifier field for specific retrieval purposes is permitted on a selective basis.

Clearinghouses wishing to use an Identifier in a special way are encouraged to coordinate the proposed Identifier with the Facility lexicographic staff prior to the transmission of a large number of documents using such a term.

SPECIAL INDEXING ARRANGEMENTS NAME OF THE DOCUMENT		INDEXING GUIDELINES
ERIC Digests Produced by Clearinghouses		All Digests emanating from the ERIC Clearinghouses are indexed by the minor Identifier "ERIC Digests."
National Assessment of Educational Progress (NAEP)		The NAEP is currently operated by the Educational Testing Service. All NAEP documents should be indexed: (1) by "National Assessment of Educational Progress; and (2) by the name of the specific assessment, if that is the topic of the document (e.g., Reading Assessment (1992)). If the document concerns results from the trial state assessments, the Identifier "Trial State Assessment (NAEP)" should be assigned along with the assessment name, e.g., "State Mathematics Assessments," and the name of the state, e.g., "Minnesota."
National Diffusion Network (NDN)		Documents <u>about</u> NDN should be indexed by the (preferably major) Identifier "National Diffusion Network." Documents <u>generated by programs or projects under NDN sponsorship</u> should be indexed by the minor Identifier "National Diffusion Network Programs," and also by an Identifier (preferably major) for the specific program/project name, e.g., "Project Adventure."
Program Effectiveness Panel (PEP) [Successor to the Joint Dissemination Review Panel (JDRP)]		Documents describing PEP or JDRP validated programs should be indexed by the minor Descriptor "Validated Programs." ² (Documents dealing with the actual subject matter of validation should be indexed with the Descriptor "Program Validation.")

FIGURE VIII-2-7: SPECIAL INDEXING ARRANGEMENTS

² As of June 1992, a project to enter PEP/JDRP program applications into ERIC is under discussion. If the project is implemented, additional guidelines will be provided for indexing these documents.

D. Guidelines Applying to Identifiers in Specific Categories

Every Identifier is assigned by the ERIC Facility to one (and only one) of the twenty broad categories listed in Figure VIII-2-1. The category number is assigned to the Identifier at the time it is entered into the Identifier Authority List (IAL). Identifier categories serve the same purpose for Identifiers that Descriptor groups do for Descriptors, i.e., browsing and easy scanning of large numbers of terms that may be of interest within a given area.

Individual listings of Identifiers by category are published at the same time as complete alphabetical cumulations are published. Certain older categories (01 for "Acronyms" and 06 for "Foreign Words and Phrases") have been discontinued; therefore, the only active category numbers are 02-05, 0, .22.

While the rules discussed up to this point apply generally to all Identifiers, the guidelines that follow are grouped by category and apply only to terms in that specific category.

1. Conferences/Meetings (Category 02)

This category brings together the formal names of gatherings held either regularly or on a one-time basis. It is not to be confused with organizational names containing the word "Institute" or "Conference."

Identifiers for conference/meeting names are generally appropriate only when the meeting is the subject of the document. They are not normally appropriate as simply a way to tag all of the papers or proceedings from a particular meeting. The Descriptive Note field is the proper field to identify the meeting at which a paper was given. A meeting may be the subject of a document when, for example, the document is analyzing the results of a meeting, the need for a meeting, the ramifications of resolutions passed, the impact of a meeting, or the design of a meeting. However, as was noted in Section VIII-2-C.13, "Special Indexing Arrangements," on occasion Identifiers are used to "gather" for identification purposes all of the papers of a specific conference.

Natural word order is followed, without artificial inversions, e.g.:

ASHE Annual Meeting
Brookings Conference on Vocational Education
Claremont Reading Conference
White House Conference Library Info Services

Since conference names are often long and may exceed the 50-character limit, abbreviation is frequently required. Using an acronym for the organization involved is an acceptable technique, e.g.:

Conference: National Council of Teachers of English Seminar on Research in English Education (80 characters)

Use: NCTE Seminar on Research in English Education (45 characters)

Conferences that occur regularly under the same name, with only the date differing, should be entered under the standard name without date. Material for specific years can be retrieved by coordinating Identifier with Publication Date.

Since the geographic location of a conference is usually incidental and inconsequential, conference name Identifiers should almost never use forms such as "New York Conference," "Conference at Idaho Falls," etc.

Names should always be as complete as possible, especially as to the topic of the gathering, e.g.:

Use: Rutgers Conference on School Lunch Programs

Do Not Use: Rutgers Conference

2. Curriculum Areas (Category 03)

This category contains names of courses, listings in catalogs, teaching sequences, specific curricula, and other curriculum-related terms, e.g.:

Biological Sciences Curriculum Study

Business Law

Chicano Studies

Man A Course of Study

Curriculum series are frequently the end result of a project or program and may be referred to by the project/program name as well as by the curriculum name. In such situations, one name should be selected as the preferred form, e.g.:

Preferred Identifier: Bereiter Engelmann Curriculum

Non-Preferred Synonyms: Bereiter Engelmann Method

Bereiter Engelmann Preschool Program

Bereiter Engelmann Program

Bereiter Engelmann Language Training Program

3. Equipment (Category 04)

This category contains the names of specific equipment, computer hardware, software, programming languages, materials, classroom aids/tools, etc. Examples are:

Abacuses IBM Personal Computer

Answering Machines Lockers

BASIC Programming Language Lotus 1 2 3

Binoculars PASCAL Programming Language

Kinds of equipment should be entered in the plural form, e.g., "Thermostats."

Programming languages should not be entered under the acronym alone, but should have the phrase "Programming Language" appended, e.g.:

BASIC Programming Language

PASCAL Programming Language

PL 1 Programming Language

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4. Facilities (Category 05)

This category includes types of physical facilities or organizations. It excludes the names of specific organizations. Examples are:

Boards of Cooperative Educational Services
Chambers of Commerce
ERIC Clearinghouses
Montessori Schools
Stadiums
Textile Industry

Facilities Identifiers generally should be constructed in the plural form (as above). Concepts from a non-U.S. context that might be misconstrued should have an appropriate qualifier added, e.g.:

Farmer Training Centres (Kenya)
Separate Schools (Canada)

5. Geographic Locations (Category 07)

This category contains the names of continents, countries, provinces, states, territories, regions, counties, cities, parks, and all types of physical formations (e.g., rivers, mountains, deserts, valleys, deltas, islands, peninsulas, etc.). Examples are contained in Figure VIII-2-8.

a. Format

Names of the fifty (50) U.S. states and the twelve (12) Canadian provinces/territories are entered directly. Names of communities, cities, and counties in the U.S. and Canada are not entered directly; instead, these smaller political subdivisions are entered as parenthetical qualifiers to the name of the particular state or province in which each resides.

All Identifiers for countries other than the U.S. and Canada are entered with the name of a country followed by geographic subdivisions in parentheses, as appropriate. These procedures are followed in order to provide easy access to both generic and specific geographic levels (e.g., all Alabama localities will appear under the state name "Alabama," as for example "Alabama (Jefferson County)," "Alabama (Mobile)," etc.).

For purposes of this guideline, the "District of Columbia" and the U.S. "Possessions" (i.e., "American Samoa," "Guam," "Northern Mariana Islands," "Puerto Rico," and "Virgin Islands") are considered on the same level as states. Also, divisions of the United Kingdom (i.e., "England," "Northern Ireland," "Scotland," and "Wales") are considered on the same level as countries. "Preferred" country names are included in the relatively complete list that immediately follows this discussion.

The names "United States," "Canada," and "United Kingdom" are normally used without qualifiers. However, these and all other place names may be qualified by common directional notations (e.g., "west," "southeast," "north central," "midwest"), which would be ambiguous if left standing alone. Typical entries of this type would be: "Canada (Northwest)," "Europe (East)," "Mexico (North Central)." Official names such as "North Carolina" and "Northwest Territories," and meaningful concepts such as "Middle East," are, of course, not considered directional notations.

Excluding the country Australia, continents may only be subdivided by directional notations or by large nonpolitical areas, e.g., "Africa (Sub Sahara)," "Africa (Tropical)," "Asia (Central)," "Asia (West)," "Europe (East Central)."

Africa (East)	Missouri (Saint Louis)
Alabama	Mount Whitney
Alberta (Calgary)	New York (Harlem)
Antarctica	New York (Manhattan)
Appalachia	New York (New York)
Asia (Southeast)	New York (Niagara Falls)
Atlantis	Niagara Falls
Australia (Melbourne)	Nile River
Baltic States	Northern Mariana Islands
California (Los Angeles)	Ontario (Ottawa)
District of Columbia	Pacific Ocean
Easter Island	Quebec (Quebec)
England (London)	Russia (Moscow)
Europe	Sahara Desert
Everglades	Scandinavia
Florida (Hollywood)	Siberia
Ganges River	South America
Germany	South Korea (Seoul)
Gondwanaland	Sweden (Stockholm)
Great Plains	Texas (Paris)
Greenland	Timor
Guam (Agana)	United States (South)
Hong Kong	Wales
Italy (Sicily)	Washington (Seattle)
Lake Michigan	Wisconsin (Eau Claire County)
Maryland (Montgomery County)	Yakima Valley
Massachusetts (Cambridge)	Yosemite National Park
Massachusetts (Springfield)	Yugoslavia (Serbia)
Mississippi Delta	

FIGURE VIII-2-8: EXAMPLES OF HOW GEOGRAPHIC LOCATIONS ARE ENTERED AS IDENTIFIERS

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Names of overseas territories and natural geographic features and regions are entered directly and not as qualifiers to a larger entity, e.g.,

PREFERRED FORM	DO NOT USE
Easter Island	Chile (Easter Island)
Everglades	Florida (Everglades)
Siberia	Russia (Siberia)

Existence of a geographic location and its proper spelling should be verified in standard unabridged geographic dictionaries or gazetteers, e.g., *Webster's New Geographical Dictionary*, *Lippincott's Gazetteer*.

b. **Subject versus Geographic Source**

Do not confuse subject matter with geographic source. Geographic Identifiers are intended to reflect the subject matter of a document, i.e., the area studied, the area from which the data were gathered, etc., and are not intended to reflect the location of an institution doing the work, the location of an institution to which an author is affiliated, or the location of a publisher.

RIE carries a separate field to specifically identify the "Geographic Source" of a document. Although CJIE journal article records do not carry this same field, the use of Identifiers to indicate geographic source should be strictly avoided, as such a practice is misleading and detrimental to subject retrieval.

c. **Homographs**

Care should be taken in interpreting geographic locations cited in the text of documents. For example, twenty-four (24) states have a "Jefferson County"; eighteen (18) states have a "Springfield" town/city/village. Make certain that the name being used is correctly identified as to state, province, etc., and that it is not confused with a similar name from another location.

d. **Institutions and Geographic Identifiers**

Do not confuse institutions and geographic Identifiers. For example, if the subject of a document is the policies of the Chicago Public Schools, assign the specific organizational Identifier "Chicago Public Schools IL" and not the more general geographic Identifier "Illinois (Chicago)." If the document perhaps also includes the subject of the impact of these policies on the citizens of Chicago, then the Identifier "Illinois (Chicago)" would also be appropriate.

e. Country Names

Always also use the minor Descriptor FOREIGN COUNTRIES when indexing foreign country names as subjects. Country names may be major or minor, followed by city or other geopolitical subdivision, if appropriate, in parentheses.

Be precise and specific in assigning country Identifiers. For example, do not use "Great Britain" unless the subject is truly the United Kingdom excluding Northern Island. "Russia" should be used as a country name for the period before 1917 and after 1991; for the period in-between, the preferred term is "USSR (Russia)."

Do not automatically "index up" to the broad levels "United States," "Canada," and "United Kingdom." A document should be indexed by more than one level of geographic Identifier only if it genuinely deals with dual or multiple levels.

"United States" should be used sparingly, usually for various regional subdivisions, e.g., UNITED STATES (SOUTH), or for overall comparisons with other countries. Otherwise, it is implied by its absence.

Do not use AFRICA (continent) in lieu of more specific African countries.

f. Preferred Country Names

The four lists that follow display:

- (1) the U.S. "possessions";
- (2) the provinces and territories of Canada;
- (3) the divisions or states of the United Kingdom;
- (4) preferred name forms for most of the world's existing countries.

The fourth list contains a small number of cross-references. "Use" references have been made from some common but nevertheless non-preferred forms to the preferred forms, e.g., "Britain, Use Great Britain." The reciprocal of a Use reference is a "Used For" (UF) reference. "See" references have been made from older name forms to current name forms. These older names, which are sometimes appropriate for the indexing of older or historical documents, are preceded by an asterisk (*). The reciprocal of the See reference is a "Seen From" (SF) reference.

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List 1: United States "Possessions"

(quasi-independent states are
italicized and also appear in List 4)

American Samoa
Federated States of Micronesia
Guam
Marshall Islands

Northern Mariana Islands
Palau
Puerto Rico
Virgin Islands

List 2: Canadian Provinces and Territories

Alberta
British Columbia
Manitoba
New Brunswick
Newfoundland
Northwest Territories

Nova Scotia
Ontario
Prince Edward Island
Quebec
Saskatchewan
Yukon Territory

List 3: United Kingdom Divisions or States

England
Northern Ireland
Scotland
Wales

List 4: Preferred Country Names

(* = older name form)

Afghanistan	*Burma SEE Myanmar
Albania	Burundi
Algeria	Cambodia
Andorra	UF Kampuchea SF Khmer Republic
Angola	Cameroon
Anguilla	Canada
Antigua and Barbuda	NOTE When appropriate, use province (see List 2, above)
Argentina	Cape Verde
Armenia	Central African Republic
Aruba	*Ceylon SEE Sri Lanka
Australia	Chad
Austria	Chile
Azerbaijan	China
Bahamas	NOTE Do not confuse with Taiwan
Bahrain	UF Mainland China; Peoples Republic of China
Bangladesh	Ciskei
SF East Pakistan	Colombia
Barbados	Comoros
Belarus	Congo
Belau	Cook Islands
USE Palau	Costa Rica
Belgium	Croatia
Belize	Cuba
SF British Honduras	Cyprus
Benin	Czechoslovakia
SF Dahomey	*Dahomey SEE Benin
Bermuda	*Democratic Yemen NOTE Merged into Yemen (q.v.) and dissolved in May90
Bhutan	UF Southern Yemen
Bolivia	Denmark
Bophuthatswana	Djibouti
Bosnia and Herzegovina	Dominica
Botswana	Dominican Republic
Brazil	
Britain	
USE Great Britain	
*British Guiana	
SEE Guyana	
*British Honduras	
SEE Belize	
Brunei	
Bulgaria	
Burkina Faso	
SF Upper Volta	

VOCABULARY—IDENTIFIERS

*East Germany NOTE Reunified into "Germany" in Oct90 UF German Democratic Republic	Guadeloupe Guatemala Guyana SF French Guiana
*East Pakistan SEE Bangladesh	Guinea Guinea Bissau
Ecuador	Guyana SF British Guiana
Egypt	Haiti
El Salvador	*Holland SEE Netherlands
Estonia	Honduras
*Ellice Islands SEE Tuvalu	Hong Kong
Equatorial Guinea	Hungary
Ethiopia	Iceland
Federal Republic of Germany USE West Germany	India
Federated States of Micronesia UF Micronesia (Federated States)	Indonesia
Fiji	Iran
Finland	Iraq
*Formosa SEE Taiwan	Ireland
France	Israel
*French Guiana SEE Guiana	Italy
French Polynesia	Ivory Coast
Gabon	Jamaica
Gambia	Japan
Georgia NOTE Use for both U.S. state and west Asian nation	Jordan
German Democratic Republic USE East Germany	Kampuchea USE Cambodia
German Federal Republic USE West Germany	Kazakhstan
Germany NOTE See "East Germany" and "West Germany" for the 1945-1990 time frame	Kenya *Khmer Republic SEE Cambodia
Ghana	Kirgizstan
*Gilbert Islands SEE Kiribati	Kiribati SF Gilbert Islands
Great Britain NOTE When appropriate, use England, Scotland, or Wales	*Korea SEE North Korea; South Korea
UF Britain	Kuwait
Greece	Laos
Grenada	Latvia
	Lebanon
	Lesotho
	Liberia
	Libya
	Liechtenstein
	Lithuania
	Luxembourg
	Macao
	Macedonia

VOCABULARY—IDENTIFIERS

<p>Madagascar SF Malagasy Republic Mainland China USE China *Malagasy Republic SEE Madagascar</p> <p>Malawi Malaysia Makdives Mali Malta Marshall Islands Martinique Mauritania Mauritius Mexico Micronesia (Federated States) USE Federated States of Micronesia</p> <p>Moldova Monaco Mongolia Montserrat Morocco Mozambique Myanmar SF Burma Namibia UF South West Africa Nationalist China USE Taiwan Nauru Nepal Netherlands SF Holland Netherlands Antilles New Caledonia New Hebrides New Zealand Nicaragua Niger Nigeria Niue North Korea SF Korea *North Vietnam SEE Vietnam Norway Oman</p>	<p>Pakistan SF West Pakistan Palau UF Belau Panama Papua New Guinea Paraguay Peoples Republic of China USE China</p> <p>Peru Philippines Poland Portugal Qatar Reunion *Rhodesia SEE Zimbabwe Rumania Russia</p> <p>NOTE See "USSR" and "USSR (Russia)" for the 1917-1991 time frame</p> <p>Rwanda Saint Kitts and Nevis Saint Lucia Saint Vincent and the Grenadines San Marino Sao Tome e Principe Saudi Arabia Senegal Seychelles Sierra Leone Singapore Slovenia Solomon Islands Somalia South Africa South Korea SF Korea *South Vietnam SEE Vietnam South West Africa USE Namibia Southern Yemen USE Democratic Yemen Spain *Spanish Sahara SEE Western Sahara Sri Lanka SF Ceylon</p>
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VOCABULARY—IDENTIFIERS

Sudan	*USSR
Surinam	NOTE Established in 1917. dissolved in 1991—use "Russia" or the names of other former republics directly after 1991
Swaziland	
Sweden	
Switzerland	
Syria	
Taiwan	Uzbekistan
UF Nationalist China	
SF Formosa	
Tajikistan	Vanuatu
*Tanganyika	Vatican City State
SEE Tanzania	Venda
Tanzania	Venezuela
SF Tanganyika	Vietnam
Thailand	SF North Vietnam; South Vietnam
Togo	Wallis and Futuna Islands
Tonga	*West Germany
Transkei	NOTE Reunified into "Germany" in Oct90
Trinidad and Tobago	UF Federal Republic of Germany; German Federal Republic
Tunisia	*West Pakistan
Turkey	SEE Pakistan
Turkmenistan	Western Sahara
Turks and Caicos Islands	SF Spanish Sahara
Tuvalu	Western Samos
SF Ellice Islands	Yemen
Uganda	NOTE North Yemen and South (Democratic) Yemen were united in May90
Ukraine	Yugoslavia
United Arab Emirates	NOTE States achieving independence in 1991-early 1992 were "Bosnia and Herzegovina," "Croatia," "Macedonia," and "Slovenia" (see separate entries)
United Kingdom	Zaire
NOTE When appropriate, use "country" (see list 3, above)	Zambia
United States	Zimbabwe
NOTE When appropriate, use name of state or possession (see "possessions" in List 1)	SF Rhodesia
*Upper Volta	
SEE Burkina Faso	
Uruguay	

6. Groups (Ethnic) (Category 68)

This category contains the names of groups of people related by ethnic, cultural, racial, or national factors.

a. Plural versus Singular

American Indian groups are entered in the singular (see special instructions under item "d" below). All other groups are entered in the plural form. Examples are:

Africans
British
Canadians
English Canadians

b. Group Names versus Language Names

Group names and language names are often homographs. The convention observed by ERIC is to modify the group name to distinguish it from the language name. For example,

<u>Group (from IAL)</u>	<u>Language (from Thesaurus)</u>
Apache (Tribe)	Apache
Chinese People	Chinese

c. Identifier Groups vs. Descriptor Groups

Some ethnic groups are Descriptors, e.g., Spanish Americans. Indexers must, therefore, check both the *Thesaurus* and the *IAL* before entering groups in either field.

Some subgroups of an ethnic group must be indexed coordinately using both Identifiers and Descriptors, e.g.,

Indexable Concept	African Children
Index Terms	Identifier: Africans Descriptor: Children

d. American Indians

An American Indian group may be designated as a tribe, band, people, or nation. American Indian groups are not pluralized, but are entered in the singular form, e.g., Apache (Tribe) not Apaches. Examples are:

Aleut (Tribe)
Cherokee (Tribe)
Cherokee Nation
Cheyenne (Tribe)

Chippewa (Tribe)
Navajo (Nation)
Pueblo (People)

VOCABULARY—IDENTIFIERS

All American Indian groups may be further subdivided. In such cases, the specific subgroup should be qualified by the name of the larger group, e.g.,

Laguna (Pueblo)

Certain broad American Indian group names that are neither tribe, band, nor nation, emanate from the discipline of anthropology and can be qualified as such to indicate to non-specialists that the terms are well-defined and authoritative, e.g.,

Plains Indians (Anthropology)

For consistency throughout the system, the following indexing conventions should be observed when indexing American Indian groups:

AMERICAN INDIANS COUNTRY OF RESIDENCE	PRESCRIBED IDENTIFIERS
• those residing in the 48 contiguous United States	Descriptor: American Indians Identifier: Tribal Name; State (if appropriate)
• those residing in Alaska	Descriptor: American Indians; Alaska Natives Identifier: Tribal Name
• those residing in Canada	Descriptor: American Indians; Canada Natives Identifier: Tribal Name; Province (if appropriate)
• those residing in Western Hemisphere, south of the Rio Grande	Descriptor: American Indians Identifier: Tribal Name; Country (if appropriate)

e. Miscellaneous

Persons residing in the United States who are commonly referred to in the literature as "Americans" should be indexed by the Identifier:

Americans (United States)

7. Groups (Occupations) (Category 09)

This category contains the specific or collective names of occupations. All group names are formed and pluralized in accordance with the current *Dictionary of Occupational Titles* (U.S. Department of Labor). This ensures that occupational titles used by ERIC are in sex-neutral formats. Examples are:

- Contract Officers
- Conveyor Operators
- Documentalists
- English Teachers
- Foundry Occupations
- Line Repairers
- Procurement Personnel

Because ERIC is an education-related database and not one emphasizing labor or business, occupational group names should not be created with excessive specificity. In addition, since the ERIC *Thesaurus* already contains many occupational groups, it should always be consulted before new Identifiers are created. The following consolidations illustrate both guidelines:

PREFERRED TERM (Identifier)	NON-PREFERRED IDENTIFIERS
Textile Occupations (Identifier)	Folders (Garment) Knitting Machine Operators Yarn Winders
Dietitians (Descriptor)	Clinical Dietitians Community Dietitians
Laundry Drycleaning Occupations (Descriptor)	Hand Pressers Shirt Pressers Launderers Laundry Bundlers

Each occupation has a corresponding activity. Often the only difference between the two is the ending, with the occupation ending in "-ers" or "-ors" and the activity ending in "-ing." There is no general rule for preferring one word form over the other and the literature itself generally dictates which form is first used for indexing. However, both forms are usually not needed in the same vocabulary and if one already exists the other should not be created. For example, given a document on the training of woodworkers, use the existing Descriptor "Woodworking." Do not establish a new "Woodworkers" population term. Cover the population with the existing Descriptors "Semiskilled Workers" or "Skilled Workers," as appropriate.

NOTE: Occupation/Activity overlaps currently exist between some Identifiers and/or Descriptors. These are reviewed as detected and generally one term is discontinued in favor of another (to which postings are transferred). A current example of this type is the Identifiers "Weavers" and "Weaving."

VOCABULARY—IDENTIFIERS

8. Groups (Other) (Category 10)

This category gathers together population groups which share one or more characteristics, excluding ethnic or occupational characteristics. Examples are:

Consumers
English Majors
Nondegree Students
Tenants

All term forms are plural.

Population groups whose unifying characteristic is a philosophy or religion should not be created as a group name, but should be indexed under the name of the philosophy or religion and assigned to Identifier Category 16, e.g.:

PREFERRED (Category 10—Identifiers)	NONPREFERRED
Atheism Christian Science Idealism	Atheists Christian Scientists Idealists

9. Health-Related (Including Psychology) (Category 11)

This category contains the names of diseases, sicknesses, and disorders. In addition, it contains terms related to medicine, physiology, nutrition, and drugs. Psychology and mental health are included. However, health-related equipment is assigned to Category 4—Equipment. Examples are:

Approach Avoidance Conflict
Aspirin
Chromosomes
Electromyography
Hemoglobin
Noonan Syndrome
Self Examinations (Physical)

Many medical concepts have both an English and a Latin name. Selection of the appropriate name in these instances should depend on usage by the medical profession. A primary reference for determining this usage is the National Library of Medicine's *Medical Subject Headings—Annotated* (MeSH). MeSH should also be considered the authority for resolving any spelling variances.

Psychological terms are heavily represented in this category. The primary reference that should be consulted to determine usage, format, and spelling is the American Psychological Association's *Thesaurus of Psychological Index Terms*. Terms in the field of psychology are prone to being homographs and as a result must often be qualified in order to distinguish them properly.

Examples are:

Crystallization (Psychology)
Patterning (Neurology)
Retroaction (Psychology)
Specimen Records (Behavior)
Vital Signs (Physiology)

Parenthetical qualifiers/modifiers should be in the same format as in the ERIC *Thesaurus*.

NOTE: Some older qualifier/modifier formats still exist in the Identifier file and are gradually being converted.

Many of the Identifiers in this category eventually become Descriptors. For this reason, indexers contemplating the establishment of a new health-related Identifier should always take particular care to check the ERIC *Thesaurus* first. The Descriptor Group family "Physical and Mental Conditions" (groups 210, 220, 230, and 240) is one good means of conducting such a review.

10. Historical/Special Events (Category 12)

This category contains the names of special days, movements, historical periods, and periodic events usually having a state, national, cultural, or historical significance. Examples are:

Black History Month
Gulf War
Jacksonian Era
National Library Week
Nineteenth Century

Names of events that could be homographs should have geographic location, date, or other qualifier added, e.g.:

Cultural Revolution (China)
Depression (Economic 1929)

VOCABULARY—IDENTIFIERS

Class trips, special days honoring local individuals, and events that have very limited usefulness in themselves as index terms should not be established, but should be represented by more generic Identifiers or Descriptors, e.g.:

TERM ENTERED	PREFERRED	
	DESCRIPTOR	IDENTIFIER
Yellow Ribbon Day	Class Activities	Iranian Hostages
Harvard 1991 Reunion	Alumni	Class Reunions Harvard University MA

11. Languages/Linguistics (Category 13)

This category contains the proper names of languages, as well as all other language/linguistic-related concepts, grammatical, syntactical, and speech-related terminology. Examples are:

Bahar
Balto Finnic Languages
Bangkok Dialect
Bitransitive Clauses
Commas
Connectives (Grammar)

The ERIC Thesaurus contains many languages (Descriptor Group 440—Languages) and should always be consulted before adding any language names to the Identifier field. Subdivisions and dialects of languages are generally not in the Thesaurus and may be entered as Identifiers; however, dialects used by a small number of people should usually not be indexed. Instead, index the language of which it is a dialect and include the dialect name in the Abstract where it can still be retrieved. In order to keep all terms concerning a given language together, the Identifier is created with the main language first followed by the subdivision, dialect, or other qualifier, e.g.:

English (British)
English (Canadian)
Turkish (Ottoman)

Before creating a new "language" Identifier, indexers are encouraged to call the ERIC Clearinghouse on Languages and Linguistics for advice, or to use one of the following authorities:

Classification and Index of the World's Languages by C. F. and F. M. Voegelin (Elsevier, 1977).

Ethnologue (10th edition), by Wycliffe Bible Translators (1984).

Ethnic groups and their corresponding language are often spelled the same in common usage. The guidelines in Category 8-Groups (Ethnic) describe methods to distinguish group from language, e.g.:

CONCEPT	DESCRIPTION	IDENTIFIER
People of Greece		Greeks
Language of Greece	Greek	
Tlingit (Eskimo Language)		Tlingit
Tlingit (Eskimo Tribe)		Tlingit (Tribe)

NOTE: The language of the document itself should not be indexed in the Identifier field. A special field (LANG) exists for specifying the language of the document.

12. Laws/Legislation (Category 14)

This category contains laws and enacted legislation, court cases, and legal concepts that are the subject of a document.

Examples of typical terms in this category are:

Canada United States Free Trade Agreement 1989
 Civil Rights Act 1968 Title II
 Carl D Perkins Voc and Appl Techn Educ Act 1990
 Education Reform Act 1988 (England)
 Eminent Domain
 Hawkins Stafford Act 1988
 Lau v Nichols
 Oklahoma City Public Schools v Dowell
 Teacher Tenure Act (Michigan)
 Title IX Education Amendments 1972

Legislation that establishes a program under which a given document is funded should not be confused with the document's subject.

Identifiers in the "Laws/Legislation" category exhibit more variations in the literature in which they occur than those in any other category. While standard citations exist in the formal legislative literature, it is common for authors to refer to legislation simply by "Title" or "Chapter" number, assuming that the reader will know by the context the specific act that is being referenced. At the same time, the nature of the material is such that it is often of great interest to the education community, and large numbers of postings may be generated for a single law or court case. It is, therefore, incumbent on indexers to exercise special care in creating new Identifiers for this category.

VOCABULARY—IDENTIFIERS

a. "Short Titles" and Popular Names

Legislation should generally be entered by official "short titles," frequently assigned as convenient labels at the time the legislation (especially Federal) is formally enacted. Example:

PREFERRED NAME	NON-PREFERRED/NORMAL DESIGNATORS
Higher Education Act 1965	Public Law 89-329

Sometimes, however, "short titles" are less known and less frequently used than other "popular" names. Example:

PREFERRED NAME	NON-PREFERRED/NORMAL SHORT TITLE ALTERNATIVE DESIGNATOR
Fulbright Hays Act	Mutual Educational and Cultural Exchange Act 1961 Public Law 87-256

Although much legislation is identified by the word, "Act," another frequent designator is the word "Program." Examples:

Perkins Loan Program
Stafford Student Loan Program

Because technically they are legislative acts, such "programs" are assigned to Category 14—Laws/Legislation, rather than to the less precise Category 19—Projects/Programs.

Because of the multiplicity of alternative name forms in this category and the difficulties inherent in the task of choosing the "most popular" name, appropriate USE/UF cross-references in the IAL become essential in leading indexers to the preferred terms.

b. "Title" Numbers

Federal legislation is typically subdivided into "Titles" (identified always by Roman numerals). Title numbers may be appended to the end of broad names of legislation to create narrower and more distinctive Identifiers. Some Federal legislation is subdivided by "Chapters" and these are usually identified by Arabic numerals. Examples:

Social Security Act Title XX
Elementary Secondary Education Act Title III
Education Consolidation Improvement Act Chapter 1
Education Consolidation Improvement Act Chapter 2

A broad name without subdivision, such as "Social Security Act," should be used only when the document truly deals with the entire body of legislation represented by the name of the act.

The Title or Chapter number alone should never be used as an Identifier, as it has meaning only in relation to a particular act. There are rare circumstances, however, in which a piece of legislation becomes commonly known only by its Title number and never acquires a popular name. An example is Title IX of the Education Amendments of 1972, which deals with sex discrimination. In such a situation, it is permissible to use the Title number preceding the legislation of which it is a part, e.g.:

Title IX Education Amendments 1972

This form, however, should be avoided as much as possible.

Like broad legislative name forms, sometimes individual legislative "Titles" also become better known and more widely cited by other names. In these cases, the more "popular" name forms are chosen as preferred Identifiers. Examples:

PREFERRED POPULAR NAME	NON-PREFERRED TITLE NAMES
Emergency School Aid Act 1978	Education Amendments 1978 Title I
Ethnic Heritage Studies Program	Elementary Secondary Education Act Title IX E

c. Year

Whenever possible, if the 50-character limit permits, the year that the legislation was enacted should be appended as an integral part of the Identifier. In some cases, citing the year can be imperative in order to distinguish separate laws bearing the same basic name, e.g.:

Civil Rights Act 1871
Civil Rights Act 1964
Civil Rights Act 1991

These citations normally would contain the word "of," as in "Civil Rights Act of 1964." In all such cases, the common word "of" is removed as part of the preferred Identifier.

d. Public Law Numbers

Public Law numbers, e.g., "Public Law 102-35," should always be avoided as Identifiers unless there are no alternative "short titles" or popular names to use.

VOCABULARY—IDENTIFIERS

e. Proposed Federal Legislation

Names of proposed laws frequently change and should not be entered as Identifiers; proposed legislation sometimes takes years to be passed, if it passes at all, and the name of the legislation will normally have gone through numerous changes. It is, therefore, better to use the Identifier, "Proposed Legislation," along with appropriate generic Descriptors or Identifiers. The specific name of the proposed legislation typically appears in the Title and/or Abstract field, in any case.

Proposed Federal legislation may only occasionally be entered in the IAL, and then only in the form of a House or Senate Bill number. A House Bill is preceded by "H R," a Senate Bill by "S." Since Congressional Bill numbers begin again with each new Congress (i.e., every two years), it is essential to follow the Bill number by the number and session of the Congress in order to identify it uniquely, e.g.:

S 6 (93d Cong 1st Sess)

Because of the relatively brief "life spans" of such concepts, they are usually avoided as Identifiers. They are justified as Identifiers only if they have considerable significance for the field of education and promise to have more than one posting in the ERIC database.

f. State and Foreign Legislation

State legislation (or the legislation of a Canadian province) should be entered under its name followed by the name of the state (or province) in parentheses, e.g.:

Public Employment Relations Act (Michigan)

State legislation may be subdivided into titles, chapters, etc. As with Federal legislation, the most commonly used form is chosen as the preferred Identifier, with cross-references from non-preferred forms added to the IAL as needed.

Legislation of countries other than the United States should be entered in the same manner, e.g.:

Education Act 1968 (Kenya)
Endowed Schools Act 1869 (England)

In a few instances, the name of the state, province, or country precedes the legislative citation in the IAL. This occurs when the legislation's name could not be specifically verified or when the citation is a collection of codes for the area.

g. Court Cases

Court cases should be entered with the plaintiff and defendant cited in the same manner as in the original legal brief and not augmented. Example:

REFERRED FORM	NON-PREFERRED FORM
Brown v Board of Education	Brown v Topeka Board of Education
	Brown v Board of Education of Topeka

NOTE: In court cases, "v" (not "vs") is always used as the abbreviation of "versus."

Court case names may vary in the way they are cited in the popular literature (even to the point that the plaintiff and defendant can get reversed!). However, for indexing purposes, the original case name should continue to be used as the preferred Identifier as long as the case itself is an indexable concept in the literature.

Court decisions that may have an impact on educational practices or programs (as the Lau decision on bilingual education programs) should be indexed under the original court case name and not colloquially. Example:

REFERRED FORM	NON-PREFERRED FORM
Lau v Nichols	Lau Decision

h. Truncation

Names of legislation may often exceed the 50-character Identifier limitation, particularly when Title numbers, years, state names, etc., are added to the basic citation. Indexers should follow the truncation rules set forth in the general guidelines of this section. Truncation should be standardized for a specific act in such a way that all subdivisions of that act will file alphabetically in sequence. Example:

REFERRED FORM	NON-PREFERRED FORM
Elementary Secondary Education Act	Elementary and Secondary Education Act 1965
Elementary Secondary Education Act Title I	

VOCABULARY—IDENTIFIERS

I. Authorities

Two principal authorities helpful in verifying and standardizing legislation names are the following:

- *A Compilation of Federal Education Laws as Amended Through May 31, 1991* (House Committee on Education and Labor and Senate Committee on Human Resources). This is regularly updated.
- *Catalog of Federal Domestic Assistance* (revised annually by the Office of Management and Budget).

13. Methods/Theories (Category 15)

This category contains the names of a wide variety of methods, techniques, procedures, theories, standards, and models, both general and specific. Examples are:

DACUM Process	Planning Programming Budgeting System
Developmental Interdependence	Rasch Model
Hypothesis	Rehearsal Strategies
Kernel Method	

Caution should be exercised in creating Identifiers in this category when the name of the method, theory, etc., begins with the name of the author of the document being indexed. Unless the author is very well known, it may be better to index by the subject matter of the method. The indexer could then choose to also index the name of the author, or to not index the name and to let the searcher coordinate the Descriptors/Identifiers with the Author field. Example:

CONCEPT	POSSIBLE INDEXING	
Smith's Theory of Educational Counseling	DESC_	Educational Counseling; Counseling Theories
	IDEN_	Smith (Jill A)
OR		
Use above Descriptors alone, and let searcher check the Author Field.		

Should the method/theory or its author eventually become well enough known to be cited by others, then the name of the concept as cited can be considered for a possible new Identifier.

Coined terminology often is assigned to the Methods/Theories category. Coined names frequently appear in documents on research projects, and their use as Identifiers is discouraged except in situations where the author/researcher is well known. Conservatism in establishing such terminology will prevent a profusion of once-posted terms.

There is a conceptual overlap between the Methods/Theories category and both the Curriculum Areas and Projects/Programs categories.

14. Miscellaneous (Category 16)

This category contains a potpourri of terminology not appropriate to the other categories and not in sufficient numbers or "clumps" to form additional defined categories. The terms in this category come from such areas as athletics, philosophy, business, and literature. Many terms in this category later become Descriptors, if warranted by usage. Examples:

Autumn	New Age Thinking
Billiards	Newbery Award
Chicano Literature	Noncontact Sports
Gallup Poll	Parental Leave
Gardening	Shintoism
Gatekeeper Role	Teacher Surplus

15. Organizations/Institutions (Category 17)

This category contains the names of specific organizations of all types: government agencies, legislative bodies, foundations, school districts, professional societies, and community, educational, and industrial institutions. All names are entered as completely as space permits. Examples are:

4 H Clubs
Advisory Council on College Chemistry
American Association for Advancement of Science
American Telephone and Telegraph Company
Army
Bureau of Indian Affairs
California State Department of Education
City Colleges of Chicago IL Malcolm X College
Congress 102nd
Department of Health and Human Services
Department of Education
ERIC
ERIC Clearinghouse on Urban Education
Kellogg Foundation
Mid Continent Regional Educational Laboratory MO
National Institutes of Health
New York City Board of Education
Office of Educational Research and Improvement
Open University (Great Britain)
Social Science Education Consortium
Station WQED TV PA
Station KPFT Radio TX
Supreme Court
UNESCO
University of California Los Angeles

VOCABULARY—IDENTIFIERS

The creation and use of organizational names as Identifiers is governed by the following general rules:

- If an organization is the subject of a document, it is permissible to enter the organization's name as an Identifier. Examples of types of documents in which this would be true are:

Document A: Policies of the Miami School Board

Document B: Listings of projects funded by the Office of Educational Research and Improvement

- If an organization is the preparer, source, sponsor, or funding agent, but not the subject of the document, then it is not permissible to enter the organization's name as an Identifier. The Institution and Sponsoring Agency fields exist to capture the names of organizations having these other relationships.
- If an organization is involved both as the subject and the source of the document, then use of both the Identifier and Institution (or Sponsoring Agency) fields is permissible. An example is the document, *The National Institute of Education—Its First Five Years*, written about NIE and funded or published by NIE.

a. Geographic Designators

Different organizations in different locations may have the same basic name. For example, there are over ten "Jefferson County School Districts," over five "Saint Marys Colleges," etc. If these names were entered without geographic designation, they could not be distinguished from each other and retrieval would suffer. For this reason, all United States and Canadian organizations requiring a geographic designator must have the state or province postal style code appended, except for national Canadian organizations, which would have the modifier "Canada" appended (in parentheses). Organizations of other countries requiring a geographic designator must have the country name appended (in parentheses). Organization Identifiers with no specific geographic referents are assumed to refer to U.S. organizations.

Certain kinds of organizations, however, do not require geographic designations. The sections that follow distinguish those that do not require location information and those that do.

(1) Organizations NOT Requiring Geographic Designator

Any organization that has the name of a state or country as part of its name need not have that information repeated as part of the Identifier. Large commercial firms or not-for-profit organizations having multiple outlets or locations, agencies of the U.S. Government, and national U.S. professional associations also do not require a geographic designator. Examples:

American Association of Retired Persons
Coast Guard
Congress 102nd
Department of Education
Dow Chemical Company
Eastern Arizona College
Episcopal Church
Florida State Library
Ford Foundation
IBM Corporation
National Council of Teachers of English
*New York City Board of Education
*Oklahoma City University
Senate Subcommittee on Education
University of Maryland College Park

*NOTE: Organizations with city names that include the name of the state in which they're located, also need not carry a further geographic designator.

VOCABULARY—IDENTIFIERS

(2) Organizations Requiring Geographic Designator

In each of the examples in Figure VIII-2-9, a geographic designator is added either in order to differentiate the name from others like it or because the location adds an important dimension to the name that could bear on retrieval.

CAMPS	Camp Cuyamaca CA
CENTERS	Center for Philosophic Exchange NY East West Center HI
DAY CARE CENTERS	Casper Day Care Center WY
FOREIGN ORGANIZATIONS	Alcohol Education Centre (England) Education Corps (Iran) Federal Parliament (Yugoslavia)
HOSPITALS	Boston Childrens Hospital MA
LIBRARIES	Butte County Public Library CA East Saint Louis Public Library IL
MILITARY FACILITIES	Davis Monthan Air Force Base AZ
MUSEUMS	Baltimore Museum of Art MD
NEWSPAPERS	Chicago Daily News IL Dayton Journal Herald OH
RADIO AND TV STATIONS	Dover Educational Television Ctr (Great Britain) Station WNYC NY Station WTTW IL
RESERVATIONS	Canoncito Navajo Reservation NM Flathead Indian Reservation MT
SCHOOL DISTRICTS	Abernathy Independent School District TX Clark County School District NV
SCHOOLS/COLLEGES/UNIVERSITIES	Abraham Baldwin Agricultural College GA Academy of Pedagogical Sciences (USSR) American University DC Brock University ON Decroby School of Barcelona (Spain) Dublin College of Speech Therapy (Ireland) University of Edinburgh (Scotland)
ZOOS	Bronx Zoo NY

FIGURE VIII-2-9: Organizational Identifiers Requiring Geographic Designation

The postal style codes for the United States and Canada are displayed in Figure VIII-2-10.

SPECIAL NOTE U.S. CANADA:

Canadian organizations were originally treated just as those from other foreign countries, with the modifier "Canada" added in parentheses. However, all new Identifiers should now use the appropriate Canadian codes shown in Figure VIII-2-10. Of course, national Canadian organizations still require the parenthetical qualifier "Canada," to distinguish them from national U.S. organizations.

b. Associations and Societies

Educational, social, professional, cultural, or community associations and societies should be entered as completely and accurately as possible within the 50-character limitation. Indexers should follow the truncation rules set forth in the general guidelines of this section.

No association Identifier should be created without verifying wording, existence, and spelling. One useful verification source is the *Encyclopedia of Associations*. A document may refer to the American Association of Schools of Dentistry, the American Association for Dental Schools, or the Association of American Dental Schools when, in fact, the correct organization name is the American Association of Dental Schools. Indexers have the responsibility of verifying all association names before using them as Identifiers.

All rules for geographic designators, including the use of U.S. and Canadian postal codes, apply to the creation of association Identifiers. Examples:

Audio Visual Education Association of California

Future Farmers of America

NOTE: National Association

Future Farmers of America IL

NOTE: Illinois State Chapter

Southeast Council for Exceptional Children IL

NOTE: Requires postal code; "southeast," although a geographic referent, is ambiguous by itself.

c. Government Agencies

United States Federal government agencies are entered without the words "United States" preceding the Department, Agency, Bureau, Branch, Office, etc. Examples are:

Congress 101st

Department of Education

House of Representatives

Navy

Office of Educational Research and Improvement

VOCABULARY—IDENTIFIERS

POSTAL CODES FOR THE UNITED STATES AND CANADA			
STATE	ABBRIVIATION	STATE	ABBRIVIATION
Alabama	AL	Ohio	OH
Alaska	AK	Oklahoma	OK
Arizona	AZ	Oregon	OR
Arkansas	AR	Pennsylvania	PA
California	CA	Rhode Island	RI
Colorado	CO	South Carolina	SC
Connecticut	CT	South Dakota	SD
Delaware	DE	Tennessee	TN
District of Columbia	DC	Texas	TX
Florida	FL	Utah	UT
Georgia	GA	Vermont	VT
Hawaii	HI	Virginia	VA
Idaho	ID	Washington	WA
Illinois	IL	West Virginia	WV
Indiana	IN	Wisconsin	WI
Iowa	IA	Wyoming	WY
Kansas	KS		
Kentucky	KY	TERRITORIES	
Louisiana	LA	Guam	GU
Maine	ME	Puerto Rico	PR
Maryland	MD	Virgin Islands	VI
Massachusetts	MA		
Michigan	MI	CANADA (PROVINCES)	
Minnesota	MN	Alberta	AB
Mississippi	MS	British Columbia	BC
Missouri	MO	Manitoba	MB
Montana	MT	New Brunswick	NB
Nebraska	NE	Newfoundland	NF
Nevada	NV	Northwest Territories	NT
New Hampshire	NH	Nova Scotia	NS
New Jersey	NJ	Ontario	ON
New Mexico	NM	Prince Edward Island	PE
New York	NY	Quebec	PQ
North Carolina	NC	Saskatchewan	SK
North Dakota	ND	Yukon Territory	YT

FIGURE VIII-2-10: Postal Codes of the United States and Canada

State (or provincial) government agencies are entered with the appropriate state (or province) name preceding the agency, e.g.:

Maryland State Department of Education
Ontario Department of Health

All other government agencies—local, municipal, county, foreign, etc.—must have some geographic designator, either within the name itself or as an appended modifier.

In the case of government agencies, it is especially important to observe the general rules and guidelines concerning organizations as subjects. A document containing enrollment statistics for Pennsylvania public schools should be indexed by the Descriptor "Public Schools" and the geographic Identifier "Pennsylvania." It should not be indexed by an organization Identifier representing the issuing agency.

The *Federal Yellow Book* (published by Monitor Publishing Company) is a principal authority for Federal agency names. The *United States Government Manual* (published by the Government Printing Office) is also a source for U.S. government names, but is not as detailed as the *Yellow Book* (e.g., the *Government Manual* has only one page describing the Department of Education—OERI is listed, but none of its subdivisions, including ERIC, appear). Authorities for state education agencies include not only the *State Yellow Book* (Monitor Publishing) but the *Directory of State Education Agencies* (published annually by the Council of Chief State School Officers).

d. Institutions of Higher Education

The names of institutions of higher education (i.e., universities, colleges, junior colleges) should be entered in natural word order and not inverted as in the ERIC *Source Directory*. Example:

PREFERRED FORM	NON-PREFERRED FORM
University of Wisconsin	Wisconsin University

Institutions with several campuses or levels should be subdivided, as appropriate. For example, the State University of New York (SUNY) system has many separately administered subdivisions, and Identifiers for some of these follow:

State University of New York
(Note: Use when entire system is subject.)

State University of New York Buffalo
State University of New York Coll at Cortland
State University of NY Agric Tech Coll Alfred

Other major university systems with many subdivisions are:

City Colleges of Chicago IL
City University of New York
University of Hawaii

Academic libraries are normally indexed by the parent institution and not entered separately.

The *Directory of Postsecondary Institutions* (Volume 1: 4-Year and 2-Year; Volume 2: Less-Than-2-Year) produced annually by the National Center for Education Statistics (NCES) is used as the authority for the names of U.S. postsecondary education institutions. Other directories frequently employ variable formats for purposes of arrangement, indexing, etc., and, because of this, should not be used for purposes of Identifier verification. The NCES directory specifically reports name changes, mergers, etc.

The *World of Learning* should be used as the authority for the names of higher education institutions outside of the United States.

All higher education institution names should be verified using the above authorities. Occasionally, in the past, indexers have inadvertently entered fictitious institution names as Identifiers, not realizing that such names were "invented" by authors for the purpose of theoretical studies.

e. K-12 Educational Institutions

School district names are usually the lowest subdivisions necessary for retrieval of K-12 institutions. Identifiers for specific elementary schools and high schools should generally not be used in favor of the name for the overall school district. The specific school names may be entered in the Abstract (or Annotation) if an indexer wishes to refer to it. With many individual public schools in the United States named after George Washington, Martin Luther King, Jr., Thomas Jefferson, etc., it is unlikely that a user would search using a specific school's name.

Various name forms exist for local public school systems, and these differ widely from state to state. Also, local systems are frequently inconsistent in how they refer to themselves (e.g., documents from the school system in New York City may carry "New York City Public Schools" on the cover and "New York City Board of Education" on the title page). *Patterson's American Education* (two volumes covering elementary and secondary schools along with hospitals, colleges, medical schools, etc.) is used to determine an "official" name. The *Directory of Public Elementary and Secondary Education Agencies* (issued annually by the National Center for Education Statistics) is also helpful in locating school districts when the municipal location is unknown.

Usually one Identifier is sufficient to represent the subject of a particular local school system. The admitted distinctions among the board of education, unified school district, public school system, etc., for one locality are generally not sufficient to justify creating separate Identifiers for each entity. Example:

IDENTIFIER	ALTERNATIVE IDENTIFIERS
Philadelphia School District PA	Philadelphia City Schools Philadelphia Public Schools Philadelphia Public School System Philadelphia Board of Education

Documents dealing with various subjects pertaining to a given public school system (e.g., students, policies, etc.) should not be indexed by the geographic Identifier unless they also deal with the community at large. Examples:

Topic:	Integration policies of Boston Public School District
Use:	Boston Public Schools MA
Do Not Use: Massachusetts (Boston)	
Topic:	Housing Patterns and school integration policies in Boston
Use:	Boston Public Schools MA <u>and</u> Massachusetts (Boston)

16. Personal Names (Category 18)

This category contains the names of actual (not fictional) individuals used as the subjects of documents. Fictional characters, for which there are few Identifiers, are assigned to Category 16-Miscellaneous. Methods and theories named after a person are assigned to Category 15-Methods/Theories. Examples:

- | | |
|-------------------------------------|------------------------------|
| Adams (Abigail) | Drake (Sir Francis) |
| Agathe (Saint) | Edward VII |
| Alcott (Louisa May) | Euclid |
| Baum (L Frank) | Goethe (Johann Wolfgang von) |
| Bloom (Benjamin S) | John Paul II (Pope) |
| Byron (Lord George Gordon) | King (Martin Luther Jr) |
| Catherine of Siena (Saint) | Loyola (San Ignacio de) |
| Champlain (Samuel de) | Mao Zedong |
| Charlin (Charlie) | Newman (Cardinal John Henry) |
| Chomsky (Noam) | O Neill (Eugene) |
| Clarendon (Edward Hyde 1st Earl of) | Piaget (Jean) |
| Cummings (E E) | Plutarch |
| De Gaulle (Charles A) | Shakespeare (William) |
| | Skinner (B F) |

VOCABULARY—IDENTIFIERS

The individual's surname is entered first, with the given name, etc., normally following in parentheses. When surname and first name are the same (e.g., Chinese names), no parentheses are used. As with all Identifiers, no special characters other than parentheses should be used; initials should be separated by a space.

Use the name by which an individual is commonly identified (whether a real name, assumed name, nickname, title of nobility, or other appellation). Standard references such as the *Encyclopedia Americana* should be used to determine appropriate name forms. Examples where common usage varies from official name are as follows:

COMMONLY USED AND PREFERRED	OFFICIAL BUT NON-PREFERRED
Carter (Jimmy) Eliot (T S) Moliere Twain (Mark)	Carter (James Earl) Eliot (Thomas Stearns) Poquelin (Jean Baptiste) Clemens (Samuel Langhorne)

Do not enter two individuals having the same last name as one Identifier, no matter how closely associated the two may be, e.g.:

Smith (John)
not Smith (John and Jill)
Smith (Jill)

Computer systems, software, and equipment are occasionally named after individuals, particularly after famous persons such as the Greek philosophers. It is necessary in these situations to qualify one or more of such terms in order to differentiate them and avoid the creation of homographs, e.g.:

<u>IDENTIFIER</u>	<u>WHAT IS MEANT</u>
PLATO	Computer System
Plato of Athens	Greek Philosopher
ARISTOTLE (Computer Program)	Computer System
Aristotle	Greek Philosopher

17. Projects/Programs (Category 19)

This category contains the names of specific projects, programs, studies, etc. Examples:

Chemical Education Materials Study
Community Coordinated Child Care Program
Linguistic Bibliography Project
Mobilization for Youth
National Assessment of Educational Progress
Operation SEEK
Project Search
Project Search for Preventive Approaches
Project SPACE
Right to Read
Upward Bound

"Survey" programs are included in this category, but "survey" instruments are assigned to Category 21—Tests/Testing. Examples:

- Category 19: Teacher Followup Survey (NCES)
- Category 21: Parenting Style Survey

a. **Acronyms**

The general guideline is to avoid acronyms as Identifiers wherever possible. However, in those cases where projects are most commonly known by their acronyms, e.g., Project SPACE, such names may be used. The IAL cross-reference capability can be used to lead from spelled-out version to acronymic version (and vice versa), if appropriate. Whenever a project has both a spelled-out name and an acronym name, both should appear in the Abstract regardless of which one is selected as the Identifier.

b. **Homographs**

Project/program names provide many opportunities for homographs. Capitalization and spacing are sometimes the only clues that a project/program listed in the IAL may not be the same as the one dealt with in the document being indexed. Examples:

- Project Out Reach
- Project Outreach
- Project OUTREACH

If a project/program mentioned in a given document is different in spacing or case from a project/program name in the IAL, it is dangerous to simply assume that they are the same. The indexer should either verify the identity of the name in the IAL by checking the Scope Note or examining the earlier accessions (postings), and, if different, should create a new Identifier that matches the new format found in the document, but also differs from the earlier Identifier by something other than spacing or case.

When comparing terms to see whether they are duplicated, the ERIC computer system first compresses the term by removing blanks and special characters and then converts all characters to upper case. For this reason, terms cannot be differentiated solely on the basis of spacing or case. In order to differentiate homographs, it is necessary to add characters. Two acceptable methods are:

- Adding a subject qualifier, e.g., "Project EUREKA (Electrician Training)"
- Adding a geographic/postal designator, e.g., "Project EUREKA MN"

c. **Overlap with Curriculum Category**

Project/program names frequently overlap with Identifiers in Category 3—Curriculum Areas. Indexers should take care to avoid duplication between these two categories.

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18. Science and Technology (Category 20)

This category contains terms pertaining to the physical and earth sciences. It excludes the health/medical sciences (Category 11) and general curriculum areas covering the physical/earth sciences (Category 3). It includes mathematical concepts and technological applications of scientific knowledge. Examples:

Algae	Evaporation
Aquaculture	Factoring (Mathematics)
Biofuels	Floods
Biological Control	Quasars
Black Holes	Radioactivity
Cinefluorography	Reptiles
Coal Gasification	Silver Nitrate
Constellations	Triangles
Copper Chromate	Venn Diagrams
Diamonds	Wind Erosion
Dry Ice	Zero Population Growth

ERIC is not primarily a science and technology database and, therefore, in creating new Identifiers for this category, excessive specificity should be avoided, e.g.:

GENERAL	NON-SPECIFIC
Monkeys	Rhesus Monkeys Squirrel Monkeys

Terms in this category should be formatted similarly to Descriptors in the "Science and Technology" Descriptor Group. The principal lexicographic authority for use with this category of Identifiers is the *SPINES Thesaurus*, 1988 edition (UNESCO).

19. Tests/Testing (Category 21)

This category contains the names of specific tests, general test batteries, statistical terms related to testing, and various concepts related to inventories, searches, samples, survey instruments, measurement, and evaluation. Examples:

ACT Assessment
Bender Gestalt Test
College and University Environmental Scales
Edwards Personal Preference Schedule
General Aptitude Test Battery
Iowa Tests of Basic Skills
Minnesota Multiphasic Personality Inventory
Raven Progressive Matrices
School and College Ability Tests
Stanford Achievement Tests
Watson Glaser Critical Thinking Appraisal

The authorities used for the names of most published tests are Buros' *Mental Measurements Yearbook* and the online *Educational Testing Service Test Collection Database* (BRS File ETSF). Tests that cannot be verified in these authorities (usually unpublished or research instruments not widely disseminated) should be entered as formally cited in the document being indexed.

Test names are generally established as Identifiers according to one of two patterns:

- the test name starts with the name of its designer or creator, or
- the test name must be modified by the name of its designer or creator in order to be clearly differentiated from other similarly named tests.

Examples are:

TEST NAMES BEGINNING WITH DESIGNER'S NAME OR TITLE	TEST NAMES QUALIFIED WITH DESIGNER'S NAME OR TITLE
Gates MacGinitie Reading Tests	Adjective Check List (Gough and Heilbrun)
Harvard Project Physics Achievement Test	Behavior Prediction Test (Morrison)

Test names should not be indexed if they are incidental to the research being reported. For example, a report in which the Gates MacGinitie Reading Tests were used to simply group subjects for some purpose should not necessarily be indexed by that test name unless the scores had some bearing on the research results.

Teacher-developed classroom tests, e.g., a series of questions on *Hamlet*, are not normally considered as appropriate Identifiers because they are unlikely to be dealt with by other documents.

20. Titles (Literary and Artistic) (Category 22)

This category contains book titles, report titles, the names of journals, monographic series, plays, poems, television shows, etc. Examples:

1984 (Title)
Abe Lincoln in Illinois
America 2000
Amerika (Miniseries)
Catcher in the Rye
Future Shock
Graduate (The)
Great Bird of Love
Hamlet
Handbook of Cooperative Education
Homecoming (Pinter)
Huckleberry Finn
Jesus Christ Superstar
Journal of Chemical Education
Miami Linguistic Readers
New York Times

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Resources in Education
Roots (Haley)
Young Abe Lincoln

Reports or studies sometimes become best known by the name of the chairperson or chief investigator. If a report becomes regularly cited in this way, and not by its formal or official name, the preferred Identifier should be the name in common usage, e.g.:

REFERRED NAME	OFFICIAL NAME
Coleman Report	Equality of Educational Opportunity Report

An IAL cross-reference from the official name to the commonly cited name is appropriate in such instances.

Titles that are potential homographs should have a qualifier added as appropriate, e.g.:

1984 (Title)
Camascolendas (Television Series)
Dead Birds (Title)
Science (Journal)

Common titles that have been used by more than one author should be differentiated by adding the author's name as a qualifier, e.g.:

Homecoming (Hamner)
Homecoming (Pinter)
Homecoming (Sanchez)
Homecoming (Snow)

Books in Print and the *Cumulative Book Index*, among others, can be used as authorities to verify the titles of commercially available books.

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